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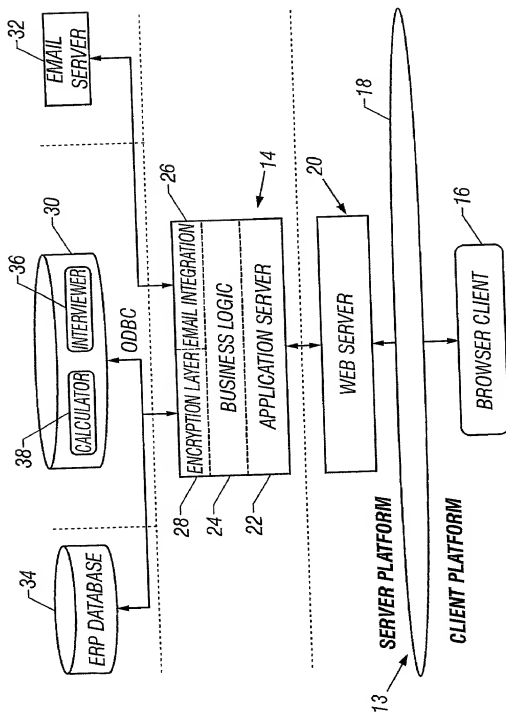


FIG. 1

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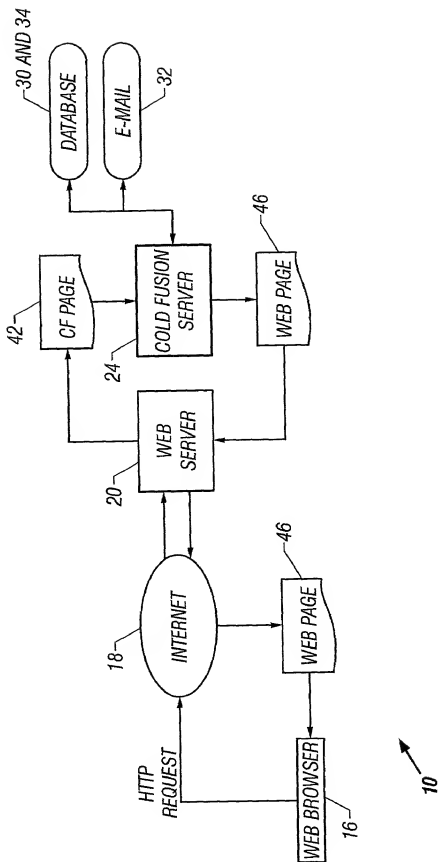


FIG. 2

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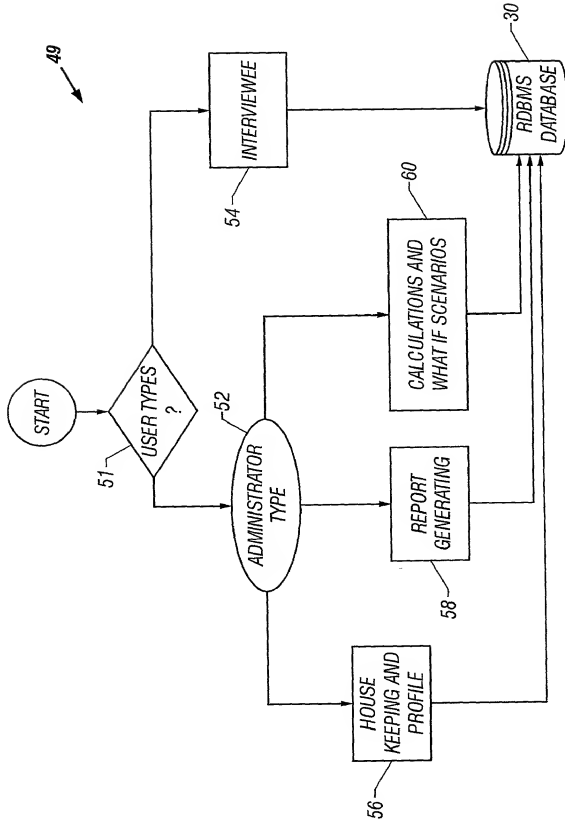


FIG. 3

FO2001-69122860

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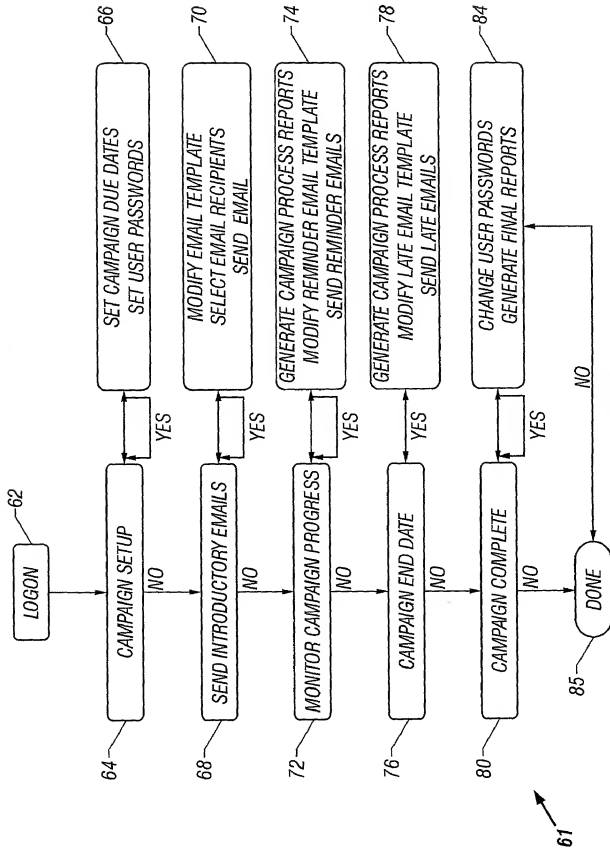


FIG. 4

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File Edit View Favorites Tools Help 90 98 Address Links	
<p>Current Company Is Planitax Current Year Is 2000</p> <p>Select Name <input type="text" value="Planitax"/> Select Year <input type="text" value="2000"/> <input type="button" value="Update"/> <input type="button" value="Add"/> <input type="button" value="94"/></p>	
<p>Current Department Is "Default Department" Number of employees in all departments is 112</p> <p>Select Department <input type="text" value="100-10-Default Department (3)"/> <input type="button" value="100"/> ID: <input type="text" value="Name:"/> <input type="button" value="Add New Department"/> <input type="button" value="104"/></p>	
<p>Employees: Displaying 20 Employees Starting From 1, Number Of Employees In Department Is 3</p> <p><input type="text" value="20"/> Number Of Displayed Employees Search <input type="button" value="Go"/> <input checked="" type="checkbox"/> Limit Search to Selected Department Only Search Is Performed On Sorted Column Only</p>	
<p><input type="text" value="102"/> ID</p>	<p><input type="text" value="FName"/> <input type="text" value="LName"/> <input type="text" value="Title"/> <input type="button" value="Review"/> <input type="button" value="Send"/> <input type="button" value="Delete"/></p> <p><input type="text" value="A-133"/> <input type="button" value="OK"/> <input type="button" value="Pltx"/> <input type="button" value="Print"/></p>
<p>Done <input type="button" value="106"/> <input type="button" value="112"/> <input type="button" value="108"/> <input type="button" value="110"/></p>	

FIG. 4A

102001'69T2Z860

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File Edit View Favorites Tools Help		114		Address Links	
Add Virtual Employees (Planifax inc. Direct Access)		50		Add Now	
Mailing System: <ul style="list-style-type: none"> <input type="radio"/> Send Introduction Email For Interview Campaign To Selected Managers Only (Two Parts) <input type="radio"/> Send Introduction Email For Interview Campaign To All Employees With Email (Two Parts) <input type="radio"/> Send Reminder Email #1 To Selected Managers Who Haven't Submitted The Interview Yet <input type="radio"/> Send Reminder Email #1 To All Employees Who Haven't Submitted A Questionnaire Yet <input type="radio"/> Send Reminder Email #2 To Selected Managers Who Haven't Submitted The Interview Yet <input type="radio"/> Send Reminder Email #2 To All Employees Who Haven't Submitted A Questionnaire Yet <input type="radio"/> Send Late Notice Email To Selected Manager Who Haven't Submitted The Interview On Time <input type="radio"/> Send Late Notice Email To All Employees Who Haven't Submitted The Interview On Time 					
Send A Hidden Copy Of Every E-mail To: <input type="text"/> (Leave Blank If You Don't Want To Send Hidden Copy) <input type="checkbox"/> Apply Only To Selected Department <input type="checkbox"/> Send Summary E-mail To From Address					
Done					

FIG. 4B

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File Edit View Favorites Tools Help		Address Links	
Administrators Information			
Representative Password	Sitedemo (Password That Must Be Entered At The First Screen) (This Field Applies To All Years)		
Return Mail	dante@planetax.com (From Mail Listed In All Mail Invitational Email)		
First Name	Admin:1 (On-Line-Help)	Admin:2	Admin:3
Last Name	Dante	Bill	Guest
Email	Orlando	Rebbeck	User
Password	dante@planetax.com	bill@planetax.com	lori@planetax.com
Update	Demo1	Demo1	Guest
Employee Passwords:			
Edit Passwords	122		
Reports:			
Run Reports	124		
Done			

FIG. 4C



FIG. 4D

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1022001*69124860


HTML Report - Submitted Questionnaires			<input type="button" value="GO BACK"/>	
File Edit View Favorites Tools Help		Address Links		
<div style="text-align: center;">  <p>R&D Tax Credit - Summary Reports Average R&D Percentages By Department Calendar Year: 2000</p> </div>				
Department	Department Name:	No. Of Quest For Dept	Average R&D%	
100-10	Default Department	1	0	
100-1001	Architecture & Validation	3	60	
100-1002	XYZ Development Team	11	59	
100-1006	PC Firmware	14	48	
100-1007	PC GM	13	77	
100-1011	R&D SW 1	21	0	
100-1014	S/W Localization	9	17	
100-1015	System Interfaces	17	0	
100-1016	Software Validation	10	49	
100-1018	PRX Hardware	8	100	
Summary: 11 Department		8	26	
<div style="text-align: right;"> <input type="button" value="GO BACK"/> </div>				

FIG. 4E

PO2001-69122860

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<div> <div> <div></div> <div></div> <div></div> </div> <div> <div>File</div> <div>Edit</div> <div>View</div> <div>Favorites</div> <div>Tools</div> <div>Help</div> </div> </div>									
<div> <div> <div></div> <div></div> </div> <div> <div>Address</div> <div>Links</div> </div> </div>									
<div> <div>R&D Questionnaire</div> <div>Detail Report By State</div> <div>Calendar Year: 2000</div> <div>State: CA</div> </div>									
Employee Name	Title	Dept.	Num.	Research	Superv.	Support	R&D	Neg	R&D
Melanie	2	Cambelango	Tester	0	0	0	0	0	100
CA	Average	0	0	0	0	0	0.0	0.0	100.0
State: CA	Average All Department	0	0	0	0	0	0.0	0.0	100.0

FIG. 4F-1

102001 6912/860

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State: CA								
Employee Name	Title	Dept.Num.	Research	Superv.	Support	R&D	Neg R&D	
Demo200	Engineer	100-10	50	50	0	100	0	
Paul	Manager	100-10	0	80	0	100	0	
CA	Average 100-10	Default Department	25	65	0	100.0	0.0	
State: CA		Average All department						
			25	65	0	100.0	0.0	
State: CA								
Employee Name	Title	Dept.Num.	Research	Superv.	Support	R&D	Neg R&D	
Mick	Vocals	100-10	0	0	0	0	100	
CA	Average 100-10	Default Department	0	0	0	0.0	100.0	
Brenda	McKenna	100-1001	25	5	100	100	0	
Christophe	Rosen	100-1001	0	4	54	58	42	
David	Jow	100-1001	4	45	4	53	47	
Marc	Lindley	100-1001	4	4	45	53	47	
Matthew	Baily	100-1001	0	100	4	100	0	
Paula	Hung	100-1001	2	8	36	46	54	
Done								

FIG. 4F-2

T0200T-6912Z860

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File Edit View Favorites Tools Help	
Address Links	
GO BACK	
	
R&D Questionnaire Statues Report	
Submitted Questionnaires	
Calendar Year: 2000	
GO BACK	
Summary: 0 Managers	
Done	

FIG. 4G

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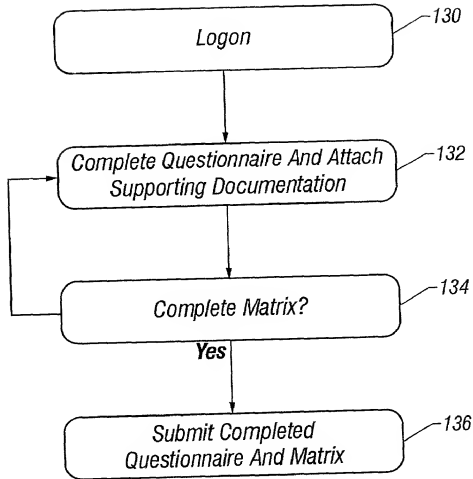


FIG. 5

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File Edit View Favorites Tools Help		Address Links	
148 QUESTIONNAIRE Your Time For Submitting The Questionnaire Has Expired! 150 152 General Information 154 First Name: Paul 156 Middle Initial 158 Last Name: Jordan 160 E-mail: seda@planitax.com 162 Department #: 100-1006 Department Name: 100-1006-PC Firmware Title: Manager		166 164 168	
INSTRUCTIONS QUESTIONNAIRE DEFINITIONS FAQ HISTORY PRIZES SAMPLES HELP		Part I: Research And Development Activities-In General To Qualify All Research And Development Activities Must Be Performed In The U.S. 1. Does Your Department Perform Only Direct Research And Development Activities? 144 O Yes O No If Yes, Go To Part II 2. Does Your Department Perform A Combination Of Direct Research And Development Activities And Direct Support Activities?	
Offered By PLANITAX			

FIG. 5A



10200T* 69T2ZS60

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R&D Interviewer

File Edit View Favorites Tools Help

HOME

INSTRUCTIONS

QUESTIONNAIRE

DEFINITIONS

FAQ

HISTORY

PRIZES

SAMPLES

HELP

Offered By

PLANITAX

MATRIX

MATRIX For Manager Brenda McKENNA

R&D Percentage:

Direct Research:

25

%

Direct Supervision:

5

%

Direct Support:

100

%

Total R&D %:

130%

Total non R&D %:

0%

Save

Warning!

GO BACK

PROCEED

171

170

○ A Red Number Signals That The Sum Of The R&D % For A Given Employee Is Greater Than 100%

FIG. 5C

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102001*69127860

File Edit View Favorites Tools Help		Address Links																																																																																																																																								
Matrix For Manager Paul Jordan																																																																																																																																										
To Expedite The Completion Of This Schedule, Insert Percentages In All Fields Before Clicking On Enter Or Save Button																																																																																																																																										
<table border="1"> <thead> <tr> <th>Name</th> <th>State</th> <th>Direct Research %</th> <th>Direct Supervision %</th> <th>Support %</th> <th>Direct %</th> <th>Total %</th> <th>R&D non %</th> <th>Total R&D %</th> </tr> </thead> <tbody> <tr> <td>Dave Crump-100-1006</td> <td>MA</td> <td>50</td> <td>25</td> <td>0</td> <td>0</td> <td>75</td> <td>25</td> <td></td> </tr> <tr> <td>Harsh Olin-100-1006</td> <td>MA</td> <td>100</td> <td>0</td> <td>10</td> <td>10</td> <td>110</td> <td>0</td> <td></td> </tr> <tr> <td>James Allison-100-1006</td> <td>MA</td> <td>45</td> <td>55</td> <td>0</td> <td>0</td> <td>100</td> <td>0</td> <td></td> </tr> <tr> <td>Jane Scoot-100-1006</td> <td>MA</td> <td>30</td> <td>0</td> <td>0</td> <td>0</td> <td>30</td> <td>70</td> <td></td> </tr> <tr> <td>Jay Conley-100-1006</td> <td>MA</td> <td>80</td> <td>0</td> <td>0</td> <td>0</td> <td>80</td> <td>20</td> <td></td> </tr> <tr> <td>Jeffrey Davis-100-1006</td> <td>MA</td> <td>60</td> <td>0</td> <td>20</td> <td>20</td> <td>80</td> <td>20</td> <td></td> </tr> <tr> <td>Jeffrey Schmidt-100-1006</td> <td>MA</td> <td>100</td> <td>0</td> <td>0</td> <td>0</td> <td>100</td> <td>0</td> <td></td> </tr> <tr> <td>Laurence Raven-100-1006</td> <td>CA</td> <td>50</td> <td>0</td> <td>0</td> <td>0</td> <td>50</td> <td>50</td> <td></td> </tr> <tr> <td>Michael Wolf-100-1006</td> <td>MD</td> <td>80</td> <td>0</td> <td>0</td> <td>0</td> <td>80</td> <td>20</td> <td></td> </tr> <tr> <td>Robert Goodall-100-1006</td> <td>MA</td> <td>100</td> <td>0</td> <td>0</td> <td>0</td> <td>100</td> <td>0</td> <td></td> </tr> <tr> <td>Robert Salerno-100-1006</td> <td>MA</td> <td>50</td> <td>0</td> <td>0</td> <td>0</td> <td>50</td> <td>50</td> <td></td> </tr> <tr> <td>Ted Cammarl-100-1006</td> <td>MA</td> <td>75</td> <td>0</td> <td>0</td> <td>0</td> <td>75</td> <td>25</td> <td></td> </tr> <tr> <td>William Deane-100-1006</td> <td>MA</td> <td>80</td> <td>0</td> <td>0</td> <td>0</td> <td>80</td> <td>20</td> <td></td> </tr> <tr> <td colspan="2">AVERAGE</td> <td>69.2</td> <td>6.2</td> <td>2.3</td> <td>77.7</td> <td>22.3</td> <td></td> <td></td> </tr> </tbody> </table>				Name	State	Direct Research %	Direct Supervision %	Support %	Direct %	Total %	R&D non %	Total R&D %	Dave Crump-100-1006	MA	50	25	0	0	75	25		Harsh Olin-100-1006	MA	100	0	10	10	110	0		James Allison-100-1006	MA	45	55	0	0	100	0		Jane Scoot-100-1006	MA	30	0	0	0	30	70		Jay Conley-100-1006	MA	80	0	0	0	80	20		Jeffrey Davis-100-1006	MA	60	0	20	20	80	20		Jeffrey Schmidt-100-1006	MA	100	0	0	0	100	0		Laurence Raven-100-1006	CA	50	0	0	0	50	50		Michael Wolf-100-1006	MD	80	0	0	0	80	20		Robert Goodall-100-1006	MA	100	0	0	0	100	0		Robert Salerno-100-1006	MA	50	0	0	0	50	50		Ted Cammarl-100-1006	MA	75	0	0	0	75	25		William Deane-100-1006	MA	80	0	0	0	80	20		AVERAGE		69.2	6.2	2.3	77.7	22.3		
Name	State	Direct Research %	Direct Supervision %	Support %	Direct %	Total %	R&D non %	Total R&D %																																																																																																																																		
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James Allison-100-1006	MA	45	55	0	0	100	0																																																																																																																																			
Jane Scoot-100-1006	MA	30	0	0	0	30	70																																																																																																																																			
Jay Conley-100-1006	MA	80	0	0	0	80	20																																																																																																																																			
Jeffrey Davis-100-1006	MA	60	0	20	20	80	20																																																																																																																																			
Jeffrey Schmidt-100-1006	MA	100	0	0	0	100	0																																																																																																																																			
Laurence Raven-100-1006	CA	50	0	0	0	50	50																																																																																																																																			
Michael Wolf-100-1006	MD	80	0	0	0	80	20																																																																																																																																			
Robert Goodall-100-1006	MA	100	0	0	0	100	0																																																																																																																																			
Robert Salerno-100-1006	MA	50	0	0	0	50	50																																																																																																																																			
Ted Cammarl-100-1006	MA	75	0	0	0	75	25																																																																																																																																			
William Deane-100-1006	MA	80	0	0	0	80	20																																																																																																																																			
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FIG. 5D

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R&D Interviewer - client's administrator access"

File

Edit

View

Favorites

Tools

Help

↩

Address

Links

Main Administrator Access

Current Distributor Is Planitax ✓ 176

Selected Distributor: Planitax ✓

New Distributor: 174

Distributor Administrators:

First Name	Last Name	E-mail	Username	Password
Igor	Grubar	igorgrubar@abc.com	James	htnima
Borut	Hrzenjak		Hrzla	htnripu
Seda	Taysi	sedatays@abc.com	Seda	111
Lisa	Yap	lisa@abc.com	Lisa	Lisa123456
Mark	Cottam		Demo	Demo

New Administrator

180

178

Current Company Is ABC"

Select Company: ABC

New Company: 178

Company Logo: ABC

Browse

Company Name: ABC

Done

FIG. 6